

North Carolina Procurement Transformation

NC E-Procurement Ariba Buyer Upgrade March 2012





Welcome & Introductions

Ariba Buyer Upgrade

NCID Interface
Michael Jackman

Testing & New Functionality
Scarlett Swain

Historical Data Approach
Jeff Harper

- Training & Communications Laura Haakenson

Bryan Doepken

Questions & Answers



NCID Interface Status Update

Single point of administration and control for simplified management and standardized processes for the State, agencies, end users, and customer applications

- Current entity NCID collection and mapping status
 - 115 communications for LEAs with at 32% response rate
 - 58 communications for Community Colleges with a **59%** response rate
- Next wave of communications starting in March
 - Will include new Buyer user data since the last reports
 - Will merge the existing responses as part of the new reports
 - Agency readiness will incorporate NCID responses
- Recommended processes associated to NCID user creation and communication
- Functional testing successfully completed as part of System Test Pass 3
 - The NC E-Procurement 9r1 system was integrated with an NCID test instance to verify user updates and authentications work as expected.



System Test Updates

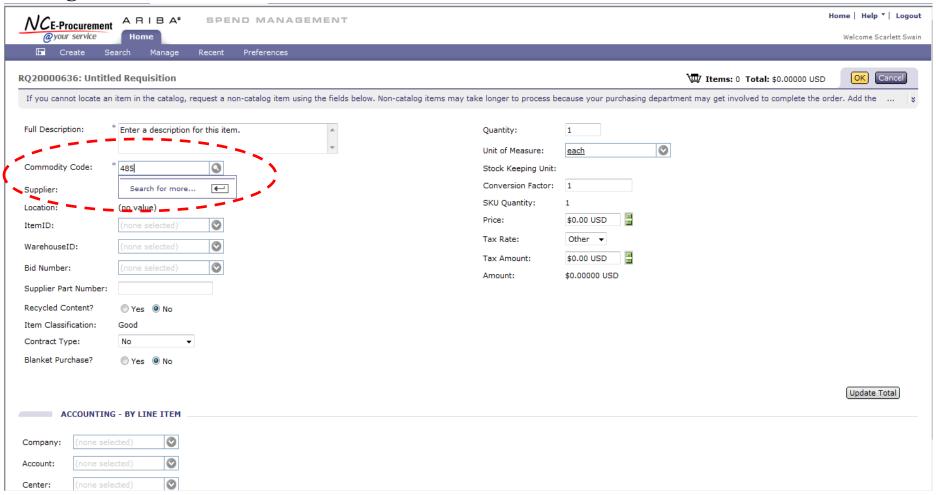
The Ariba Upgrade team has completed execution of 3 passes of system testing.

- Completed 3 passes of System Testing
 - 95% Pass Rate; No Major Issues
 - Continue working to resolve and retest remaining issues until code freeze takes effect
 - Continue working to test each integration touch point



New Functionality Highlights

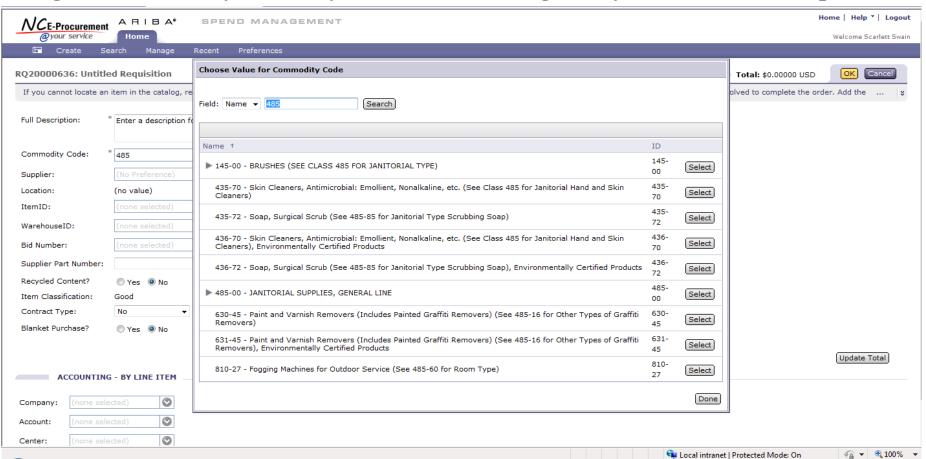
Users can now search for values by entering the search criteria directly in the field and clicking "Enter".





New Functionality Highlights

The "Search for more..." option will now produce a pop-up window with related search results. Commodity Code selection has been improved; users will now be able to drill through the commodity hierarchy, as well as searching on keywords in the description.





Historical Data Approach Guidance for a Smooth Transition

The E-Procurement implementation date was moved to align with the fiscal year end in order to reduce the impact on open transactions.

- Additional emphasis should be placed on the fiscal year end process to complete open transactions and ensure a smooth transition to the new E-Procurement system.
- EPLite entities should not stage transactions for the next fiscal year in the old E-Procurement system.
 - Users should not create requisitions in the current E-Procurement system and leave them in 'Composing' to be submitted in the next fiscal year. These requisitions will not be available in the new system and would need to be re-entered.
 - Users who submit requisitions from the E-Procurement system with a 'Need By Date' in a future fiscal year should wait to enter the requisitions in the new system after go-live. These transactions will not be imported to the E-Procurement system properly and would need to be re-entered.



Communications Activities

Training will be available in several formats to update current users on changes and provide training assets to be used going forward

- Updated job aids on the NC E-Procurement web site
- "What's New" classroom training and webinars
- Online **training modules** providing a new means of training current and future system users on system functionality
- Watch for detailed schedules and registration options coming soon

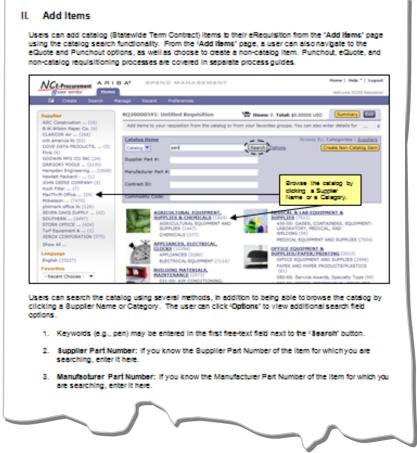




Training Formats: Job Aids

Job Aids are PDF documents providing screenshots and detailed instructions for specific tasks and topics.

- There are over 450 pages of job aids currently available in the User Training section of the NC E-Procurement web site
- These job aids are being updated to reflect the new functionality
- PDF files provide a reference library of materials available to all NC E-Procurement users
- Updated job aids will be posted in mid-April for a first look at what has changed

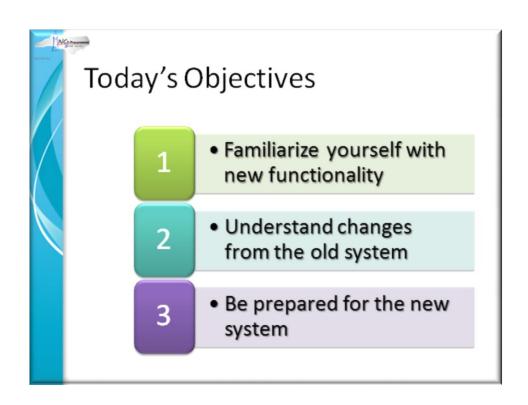




Training Formats: "What's New" Sessions

"What's New" classroom training and webinars provide an opportunity for users to learn in a live environment from the NC E-Procurement team

- "What's New" sessions offer focused instruction on changes to the system and processes
- Sessions are 2-3 hours in duration and will be held in two formats in the mid-May to mid-June timeframe:
 - Classroom training
 - Webinars





Training Formats: "What's New" Classroom Training

"What's New" classroom training sessions give entity contacts hands-on access to the upgraded NC E-Procurement and face-to-face contact with the upgrade team

• Regional training sessions will be held in six regions across the State:

Western NCCharlotte area

TriangleEastern NC

TriadSoutheastern NC



- Targeted audience is Security Administrators or other designated entity contacts
- Trainers will review a "What's New" presentation and give participants an opportunity to try out business scenarios in the training environment
- Optional afternoon sessions allow for **informal "office hours"** time to ask questions of the team beyond the structured content in the mornings



Training Formats: "What's New" Webinars

"What's New" webinars provide an opportunity for larger numbers of users to learn in a live, virtual environment from the NC E-Procurement team

- Webinars will cover the same "What's New" presentation as the classroom sessions
- Targeted audience is any NC E-Procurement user
- Participants will register for a **live session** and receive access instructions
- Presenter will guide progression through presentation with participants viewing screen
- Question & Answer time will be provided
- Collaborate! Encourage your entity to attend webinars in small groups to learn together.





Training Formats: Online Training Modules

Online training modules provide a self-paced, on-demand environment in which users can refresh or build their NC E-Procurement knowledge.

• New online training modules will provide more detailed training on general system functionality, not just new features:

Requisitioning / Approving
System Administrator / E-P Lite Administrator

System Navigation
Advanced Purchasing

ReportingReceiving (NCAS)

- Online training will be **available to users** on the NC E-Procurement web site to access individually on their schedule beginning in late May
- Training will include **demonstrations** with audio commentary and opportunities for participants to test their knowledge
- Online modules will be a valuable asset going forward for onboarding new employees



Questions?